VA LEARNING UNIVERSITY

VA TMS Domain Manager and Learning Manager Administrator Course

Session 8: Running Reports

Virtual Instructor-Led Training

Participant Guide

March 2014

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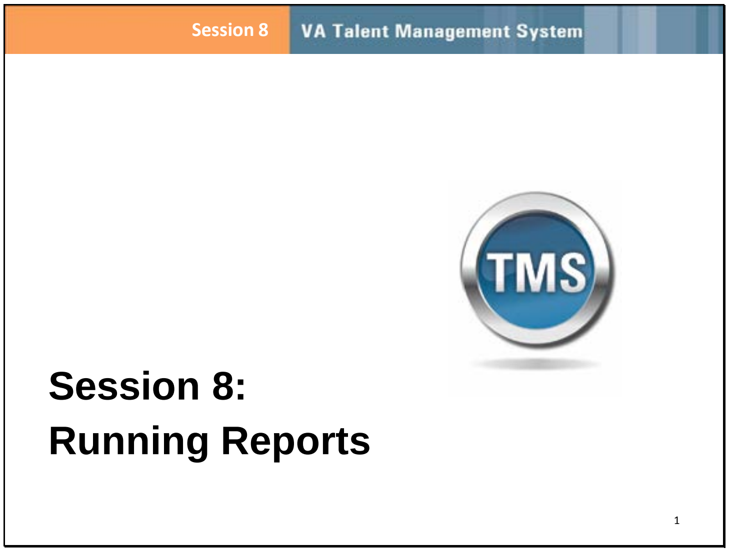
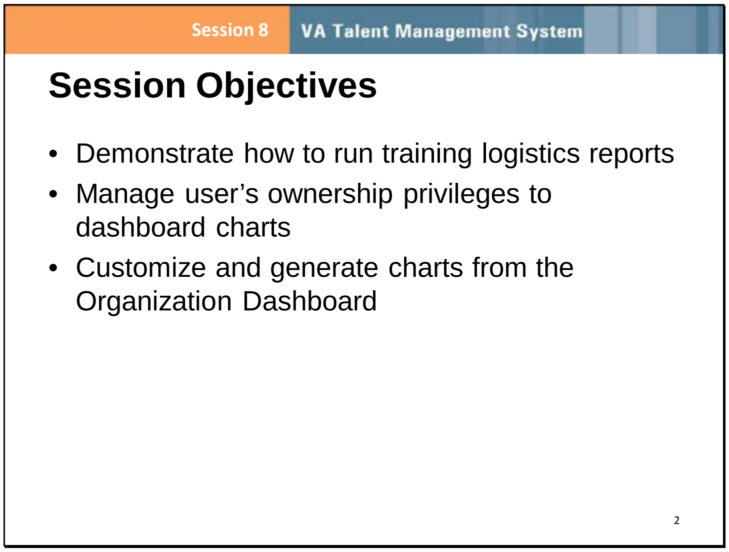
1.1 *Session 8 Overview*



Slide 1: Session 8: Running Reports

Notes:



Slide 2: Session Objectives

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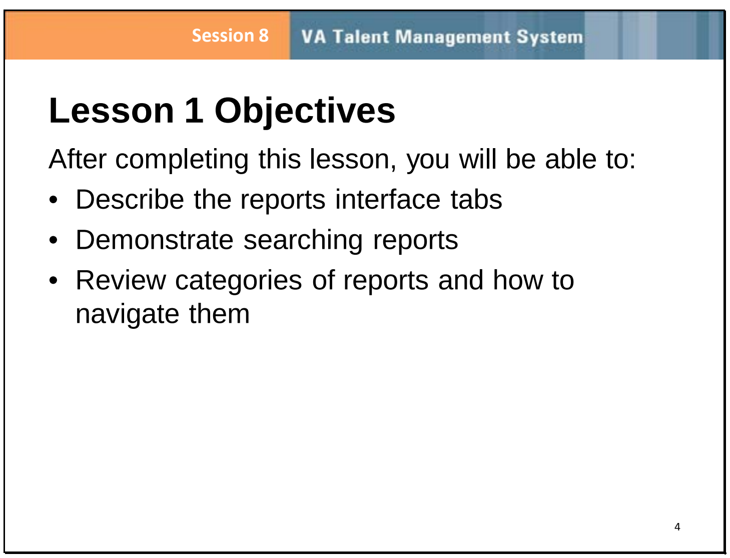
1.2 *Lesson 1: Reports: Interface, Searches, and Categories*

Slide 3: Lesson 1: Reports: Interface, Searches, and Categories

Notes:



Slide 4: Lesson 1 Objectives

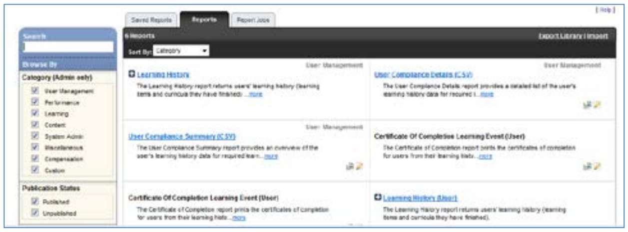
Notes:

Session 8 VA Talent Management System

Reports Overview

The VA TMS Reports interface is broken down into three main tabs:

- Saved Reports
- Reports
- Report Jobs



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Notes:

Slide 5: Reports Overview

Session 8 VA Talent Management System

Demonstration: Reports Overview

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Notes:

Slide 6: Demonstration: Reports Overview

Demonstration: Reports Overview

Reports:

The most common use of the **Reports** tab is to run available reports within the system.

- To find the desired report, browse the provided list under the **Reports** tab or use the **Search** textbox and **Browse By** options on the left side of the Reports interface to search for reports by the title or description.
- To further assist in the search for a desired report, narrow the search results by checking the corresponding checkbox in the left-hand corner to select very specific categories of reports.
- Depending on your security privileges, you may also perform advanced report tasks from the **Reports** tab, such as changing the description of reports, importing and exporting reports and libraries for customization in Report Designer, and publishing and un-publishing reports.
- The functions that you are able to perform in the reports section are controlled by report workflows given to you by the system administrator.

Saved Reports:

Once you create a saved report, you can access the report and run it without reentering filtering options.

- Saved reports are located under the **Saved Reports** tab and are specific to your admin account, meaning that saved reports are not shared among admins in the system.
- A saved report is very similar to a saved search in the VA TMS—only the admin who created the saved report is able to see it.

Report Jobs:

The **Report Jobs** tab lists the current background report jobs which are automatically running in the background.

- Jobs are created under this tab when you schedule the report to occur on a recurring basis.
- On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.
- Reports that are scheduled to run only once display under **System Admin** > **Background Jobs**.

Reports Sections:

Section 1: Formatting

The top section of the **Run Report** screen contains the following formatting options:

- Modify the report title, header, and footer
- Determine the report destination (the location where the report engine returns the data). You can return the data to the browser or to a local file. When you select Browser, the report is displayed in the internet browser window. When Local File is selected, you must save the report to a local drive before you are able to open it.
- Determine the report format

Section 2: Criteria

The selected report dictates the criteria displayed at the bottom of the **Run Report** screen. This section provides all the tools and functionality for searching. Report pages filter the data that the report returns using specific search fields. Many reports, however, also contain the following controls for filtering the data that you want to return:

1. **Mask User IDs:** For security reasons, the VA TMS can mask the user IDs so they display as a series of asterisks. Check the checkbox to hide user IDs
2. **Case Sensitive Search:** You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive searches run faster than case-insensitive searches
3. **Page Break between Records:** For longer reports, there is an option to insert page breaks between records
4. **Filter by Criteria:** Some fields in the report pages contain a **Filter by Criteria** link. When you select the link, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For example, you can return the set of users who are in the job location Washington, DC, rather than entering multiple users in the search field

Filter information:

In this demonstration, we want to run a Learning History Report for all users who report to LMSUser. Specify the supervisor(s) in the user filter and apply that filter as a criterion in order for the report to be dynamic.

1. Access the **Learning History Report**.
2. Select the **Filter by criteria** icon next to the user criteria.
3. If necessary, select **Add/Remove Criteria** to add the supervisor search filter to the search screen.

4. The **Search Criteria** pop-up window displays.
5. Select the **Supervisors** checkbox.
6. Select **Select**.
7. The **Supervisor** search query displays.
8. To create the filter, select the **Filter by criteria** icon.
9. The **Create Filter by Supervisor** screen displays.
10. If you don't know the supervisor's ID, enter search criteria in the **Last Name** and **First Name** textboxes.
11. Select **Search**.
12. Your search results are displayed.
13. Select the **checkbox(es)** to select your choice(s).
14. Select **Add to Filter**. The criteria are added to the filter.
15. Select **Submit Filter**.
16. You are returned to your original search screen.
17. The supervisor search attribute has one (1) criterion selected for this filter.
18. You can modify this filter by selecting the **Filter by criteria** icon, or you can clear the filter by selecting the **Clear Filter** icon.
19. Select **Submit Criteria** to submit LMSUser as a criterion making the search dynamic.
20. You are returned to the original report screen, with a supervisor submitted as a criterion.
21. Now, if the subordinate assignment changes, the system automatically updates the search filter of this report, and runs a Learning History report on all users who report to LMSUser at the time the report is run.

Run a report:

1. To run a report:
2. Once logged in to the VA TMS, navigate to the **Reports** menu then select the **Reports** tab.
3. Access the report you wish to run by selecting the report title.

4. Use the **Search** textbox to look for reports by title or description, or browse the reports in the provided list.
5. Select the proper category to narrow your search results.
6. Read the provided report descriptions to verify it is the report you want to run.
7. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), select the **expand** icon to the left of the report title to expand the group and see the reports that are part of the group.
8. When you find the report that you wish to run, select its title to open the **Run Report** form.
9. Complete the **Run Report** form to provide the report with the information that it needs to return the data you wish to display.
10. After formatting and criteria options have been determined, select **Schedule Job**. You can choose to schedule the report to run in one (1) of three (3) ways: as a background job to be run immediately, once at a future time, or on a recurring basis.
11. If you selected **Browser** on the **Run Report** form, the report displays in a separate browser window. If **Local File** was selected, you must first save the file to a local drive before you are able to open it.
12. Check the **Notify via email upon completion** box if you want an email sent to you when the job is completed. You can also decide to have the report directly emailed to you.
13. Select **Finish** to run the report.

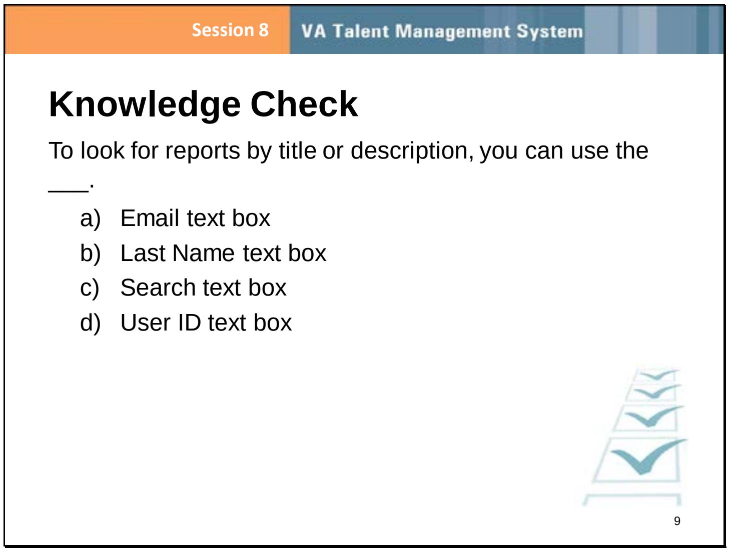
Notes:

Slide 7: System Login

Slide 8: Activity #1: Reports

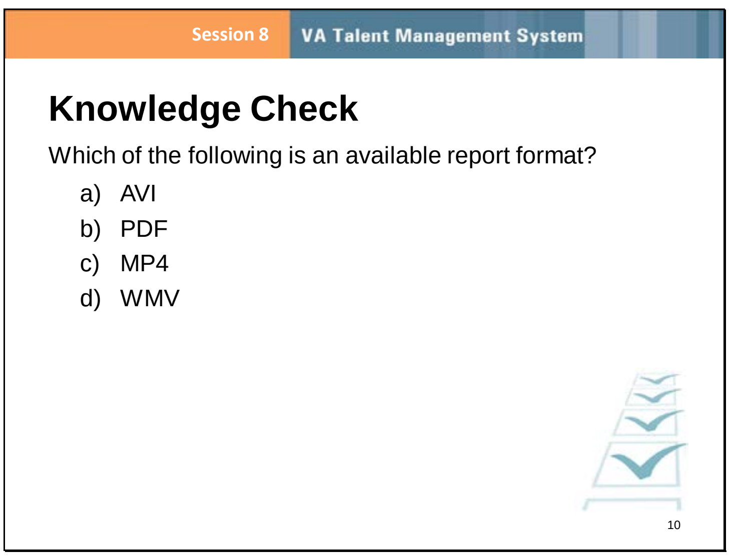
Activity #1: Reports

Now that you have had a chance to look at the features of reports, go into the VA TMS on your own and select one or two reports that you are curious about or think would be helpful. Take about five to ten minutes to complete this activity.



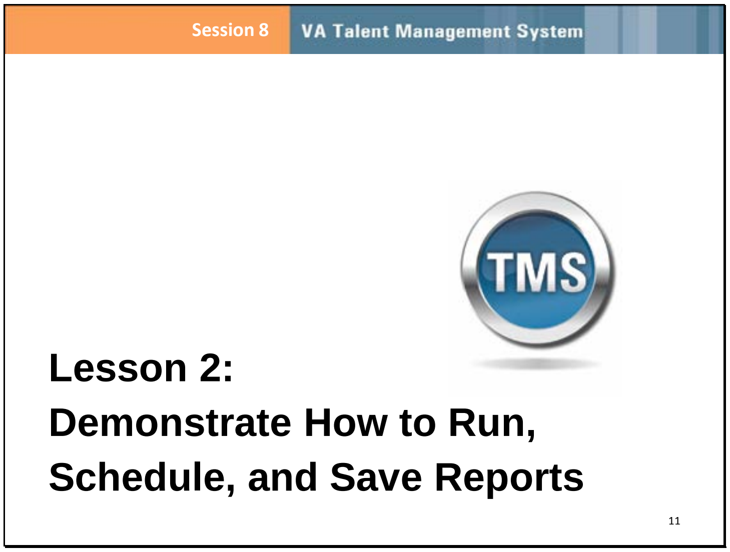
Slide 9: Knowledge Check

Notes:



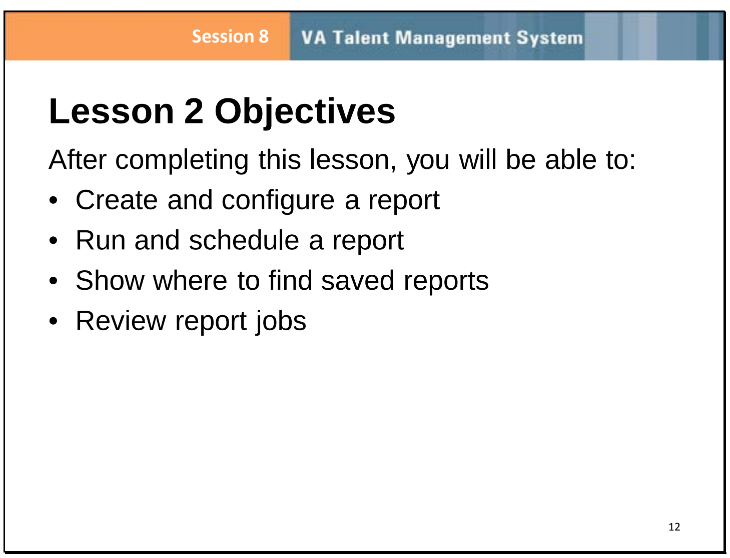
Slide 10: Knowledge Check

1.3 *Lesson 2: Demonstrate How to Run, Schedule, and Save Reports*



Slide 11: Lesson 2: Demonstrate How to Run, Schedule, and Save Reports

Notes:



Slide 12: Lesson 2 Objectives

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Session 8 VA Talent Management System

Identifying the Reports Sections

The Run Report screen has two main sections:

- Formatting
- Criteria

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Slide 13: Identifying the Reports Sections

Notes

Session 8 VA Talent Management System

Running Reports in the VA TMS

Each report differs based on the data you are requesting and returns different data elements.

Common reports used by the VA:

- Performance Review Status report
- User Plan Status report

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Slide 14: Running Reports in the VA TMS

Notes:

Slide 15: Demonstration: Running Reports

Notes:

Demonstration: Running Reports

1. Navigate to **Reports** > **Reports** tab.
2. Find the report you want to run. Use the **Search** textbox to look for reports by title or description, or browse the reports in the list provided.
3. Select the proper category to narrow your search results.
4. Read the provided report description to verify that it is the report you want to run.
5. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), select the **Expand** icon to the left of the report title to expand the group and see the reports that are part of the group.
6. When you find the report that you wish to run, select its title to open the **Run Report** form.
7. Complete the **Run Report** form to provide the report with the information that it needs to return the data you wish to display.
8. After formatting and criteria options have been determined, select **Run Report** to run the report immediately in the format you choose. If you selected **Browser**, the report displays in a separate browser window. If **Local File** was selected, you must first save the file to a local drive before you are able to open it.

Performance Review Status Report:

1. Navigate to **Reports** > **Reports** tab.
2. Select **Custom Reports** under the **Category** options on the left side.
3. Check the P**erformance** category checkbox.
4. Select **Submit**.
5. Select the report title's link.
6. In this case, you can select to run the **Performance Review Status** report grouped by organization, supervisor, or status.
7. Select the **Report Option** link.
8. Enter the title of the report in the **Report Title** textbox.
9. Make the desired changes to the formatting section.

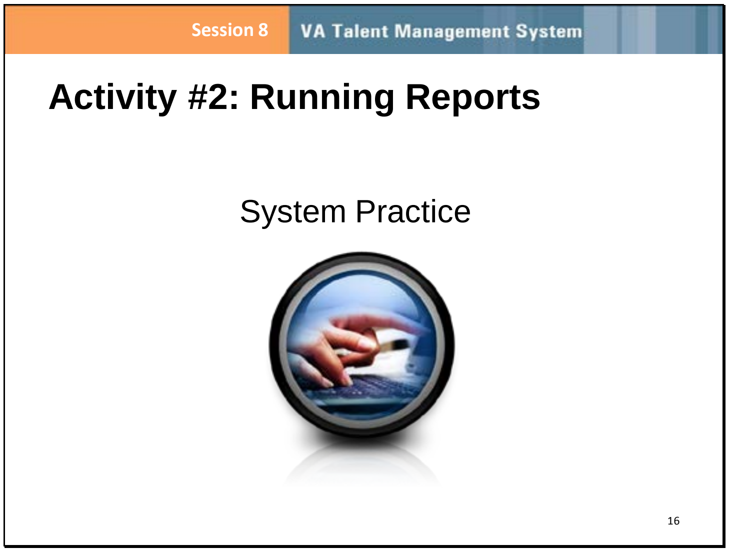
Optional:

1. Select the **Organization Create Filter** icon.
2. Search for or enter the organization ID to search for the organization to run the report.
3. Submit the filter criteria.

4. Select the **Review Process Create Filter** icon.
5. Search for or enter the review process ID.
6. Submit the filter criteria.
7. Select the performance review status.
8. Enter or select the date range.
9. Select the **Supervisor Create Filter** icon.
10. Search for or enter the supervisor ID.
11. Submit the supervisor filter criteria.
12. Select **Run Report**.

User Plan Status Report:

1. Navigate to **Reports**.
2. Enter **User Plan Status** in the **Search** textbox.
3. Check the **Performance** category checkbox.
4. Select **Submit**.
5. Select the report title’s link.
6. In this case, select to generate the **User Plan Status** report as a CSV file.
7. Select **User Plan Status (CSV)**.
8. The **User Plan Status (CSV)** screen displays.
9. Select the report destination from the drop-down menu.
10. Select the format for the report output.
11. You can select the users from a list by selecting the **Create Filter** icon to filter the search or by entering the ID into the **User ID** textbox.
12. Select **Submit Criteria** to return to the **Run Report** screen.
13. Specify the date range as desired for the report.
14. Select **Run Report**.
15. Select to open the file with Microsoft Excel or save the file locally.
16. Select **OK**.



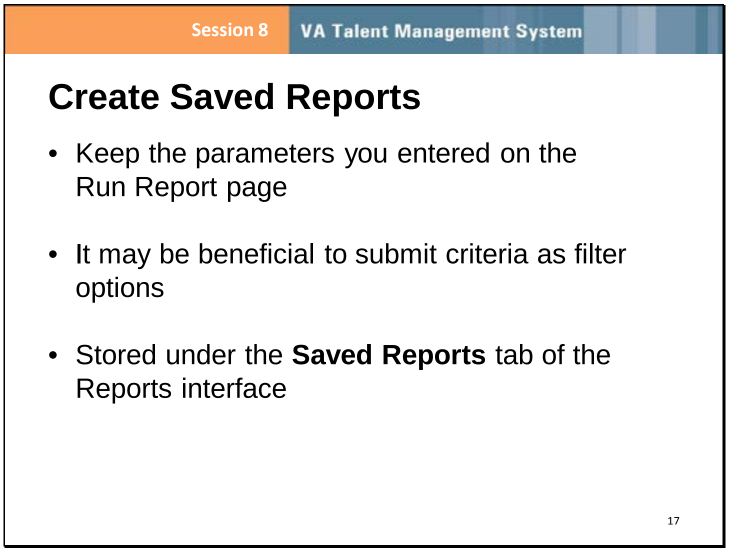
Slide 16: Activity #2: Running Reports

Notes:

Activity #2: Running Reports

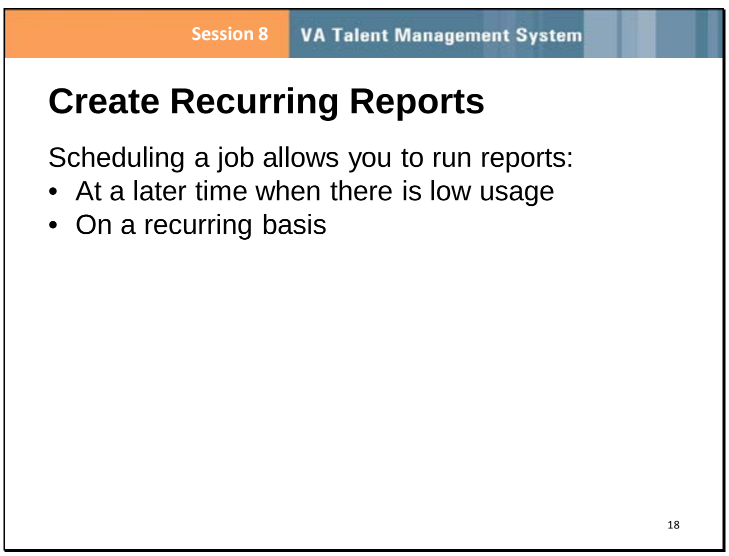
Run a report:

1. Navigate to **Reports** > **Reports** tab.
2. Find the **Training Compliance Deficiency** report for at least three users in the TRAIN domain. You can use the users you created from Session 1, or use the search filter to find other users.
3. When you find the report that you wish to run, select its title to open the **Run Report** form.
4. Select **HTML** as its Report Format.
5. Search and select at least three random users.
6. Uncheck the **Summary** checkbox.
7. After formatting and criteria options have been determined, select **Run Report** to run the report immediately.



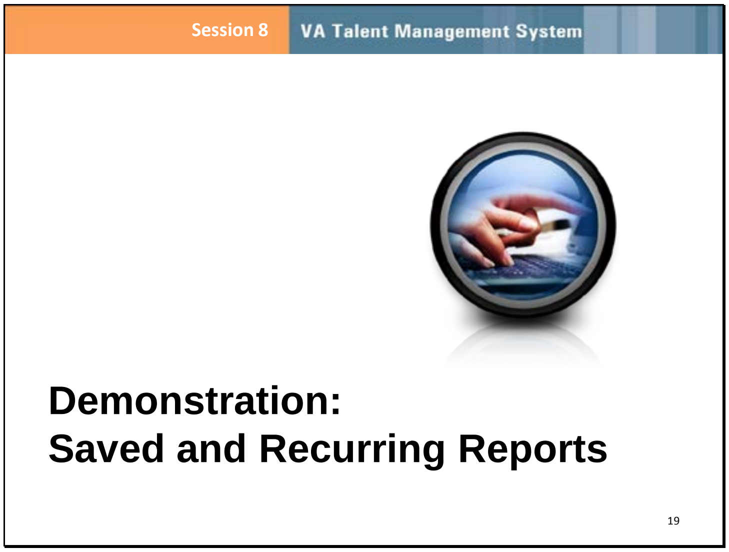
Slide 17: Create Saved Reports

Notes:



Slide 18: Create Recurring Reports

Notes:



Slide 19: Demonstration: Saved and Recurring Reports

Notes:

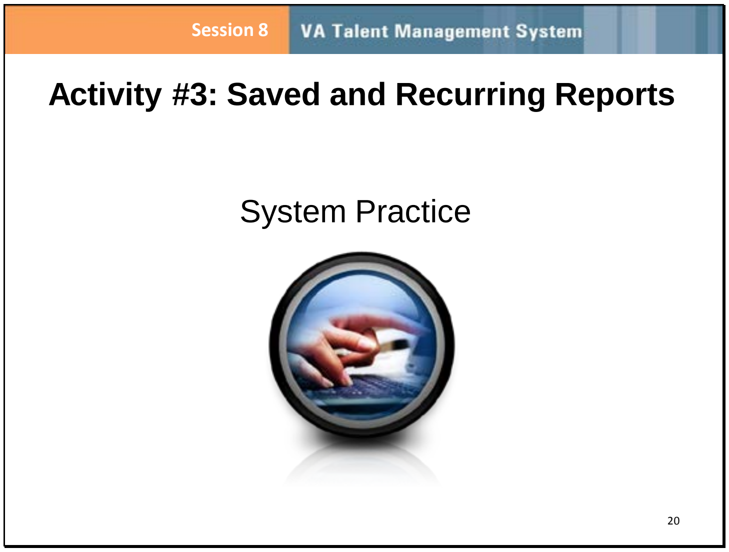
Demonstration: Saved and Recurring Reports

Save a report:

1. Using the report you generated in the previous activity, save it with a Saved Report ID.
2. Give the report a description.
3. Retrieve the report from your **Saved Report** tab.

Schedule a job:

1. From the **Run Report** page, select the **Schedule Job** button.
2. Select the radio button for **Schedule this job** to recur as follows:
3. Select the radio button for **Weekly**.
4. Select **Monday** from the drop-down options.
5. Enter the time, **1:00 p.m. EST**.
6. Ensure that the Time Zone is for America/New York (Eastern Standard Time).
7. Select the **Finish** button.



Slide 20: Activity #3: Saved and Recurring Reports

Notes:

Activity #3: Saved and Recurring Reports

Save a report:

1. Using the report you generated previously, and save it with a Saved Report ID.
2. Give the report a description.
3. Retrieve the report from your **Saved Report** tab.

Schedule a job:

1. From the **Run Report** page, select the **Schedule Job** button.
2. Select the radio button for **Schedule this job** to recur as follows:
3. Select the radio button for **Weekly**.
4. Select **Monday** from the drop-down options.
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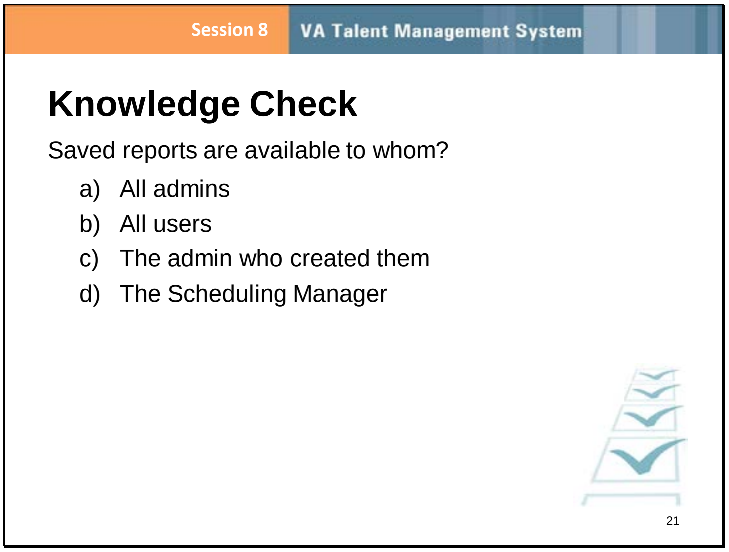
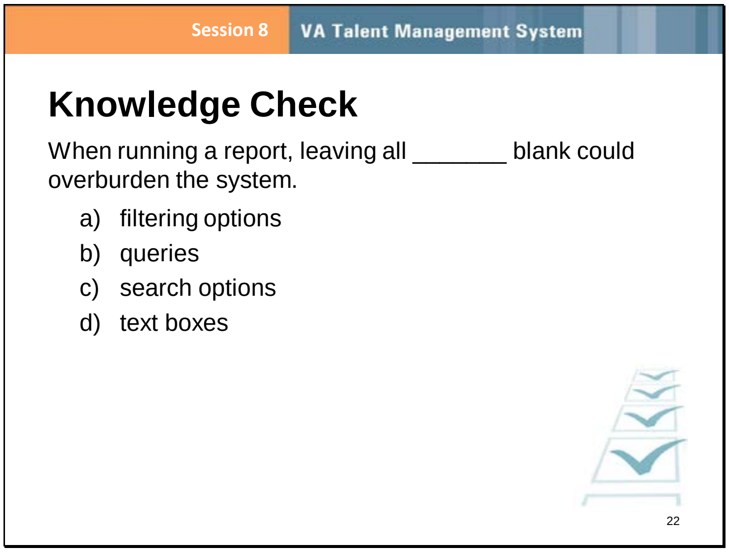
7. Select the **Finish** button.

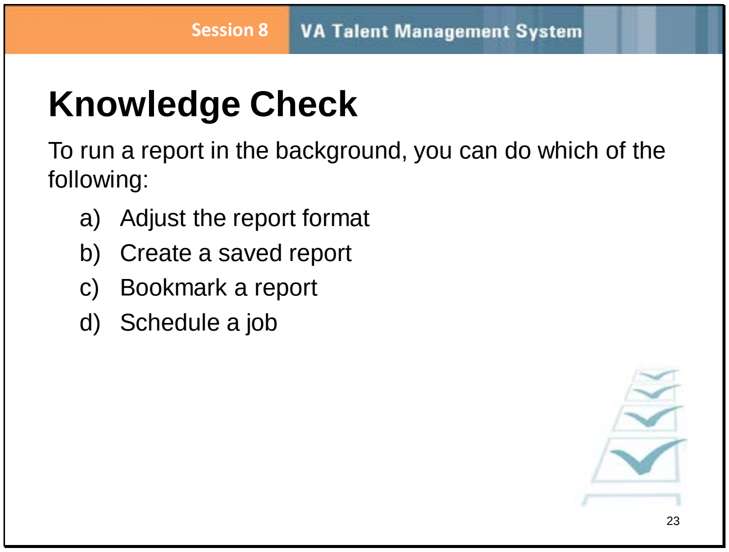


Slide 21: Knowledge Check

Notes:



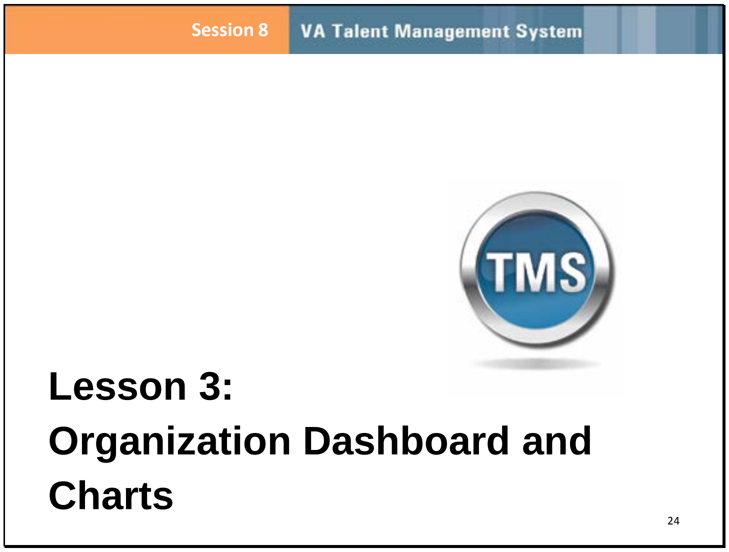
Slide 22: Knowledge Check



Slide 23: Knowledge Check

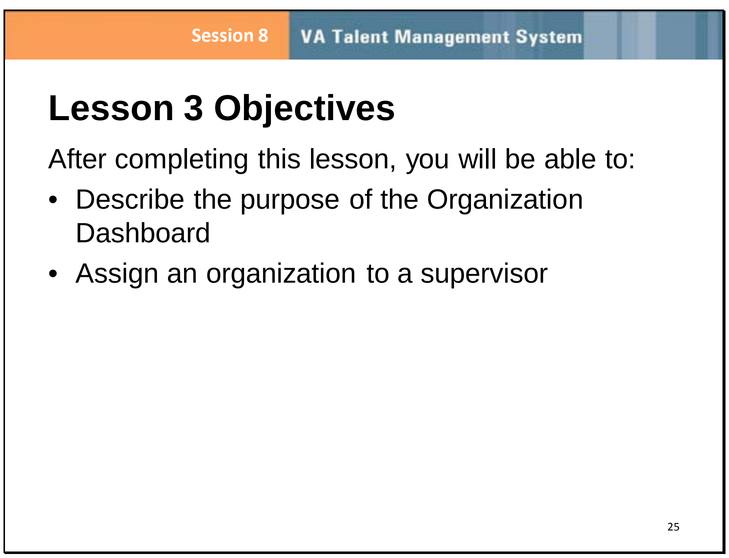
Notes:

1.4 *Lesson 3: Organization Dashboard and Charts*



Slide 24: Lesson 3: Organization Dashboard and Charts

Notes:



Slide 25: Lesson 3 Objectives

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Organization Dashboard

The Organization Dashboard:

- Allows supervisors to investigate the status or ratings of learning and performance data
- Provides charts and data tables that summarize learning and performance data for your organizations, sub-organizations, and users

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Slide 26: Organization Dashboard

Notes:

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Managing User's Ownership Privileges to Dashboards

- Only supervisors with ownership privileges can access organization charts
- To grant the privileges, navigate to the supervisor's user record and select the **Organization Dashboard** tab

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Slide 27: Managing User's Ownership Privileges to Dashboards

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Slide 30: Adding Rules to the AP

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Demonstration: Managing User's Ownership Privileges

1. To allow access to supervisors, navigate to the supervisor's user record from the **Users** button.
2. Select the **Organization Dashboard** tab.
3. To provide users with dashboard privileges, you must select the appropriate dashboard charts (e.g., Curriculum Status, Goal Progress, Item Completions) and then add one or more organizations so that associated users can access the dashboard management functionality in the user interface.
4. Select **Apply Changes** after you select the desired dashboard charts.
5. Enter the **Organization ID**.
6. Select **Add**.

Slide 29: Managing User’s Ownership Privileges

Notes:

Activity #4: Managing User's Ownership Privileges

1. Navigate to **Users**.
2. Find the user record for one of the users you created from Session 1.
3. Select the **Edit** view.
4. Select the **Organization Dashboard** tab. If you do not see it listed, select the **Advance** menu button.
5. Select the charts for **Curriculum Compliance**, **Item Completions**, and **Registration Status**.
6. Select the **Apply Changes** button.
7. Select the **HR Group 343** organization.
8. Select the **Add** button.

Session 8 VA Talent Management System

Knowledge Check

If set up as organization owners, which of the following can supervisors use to investigate the status or ratings of learning and performance data?

a) CSV formatting
b) Organization Dashboard
c) Saved reports
d) Search text boxes

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Slide 30: Knowledge Check

Notes:

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Session 8 Summary

- Demonstrate how to run training logistics reports
- Manage user’s ownership privileges to dashboard charts
- Customize and generate charts from the Organization Dashboard

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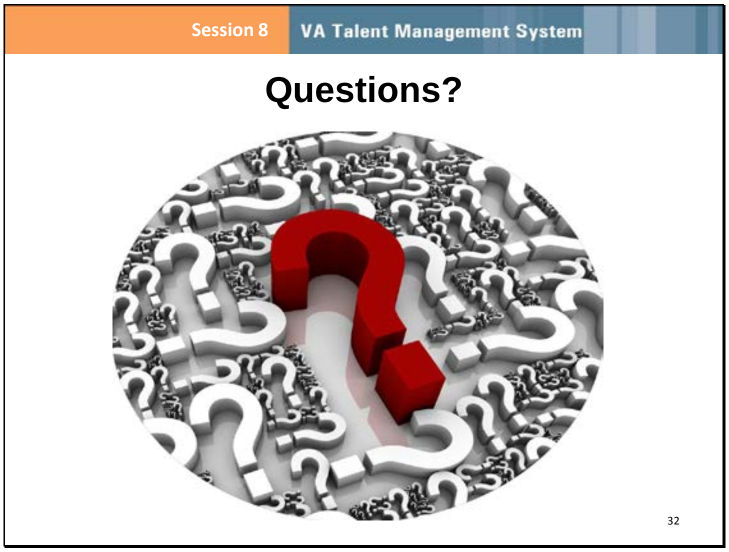
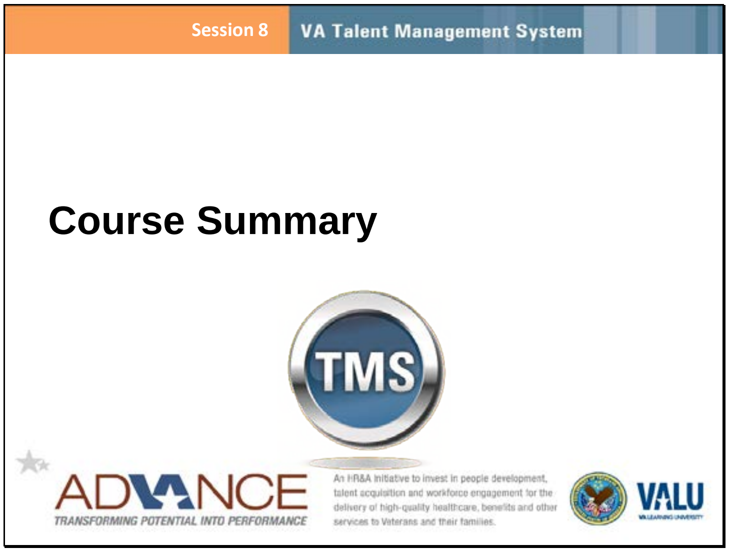
Slide 30: Session 8 Summary



Slide 32: Questions?

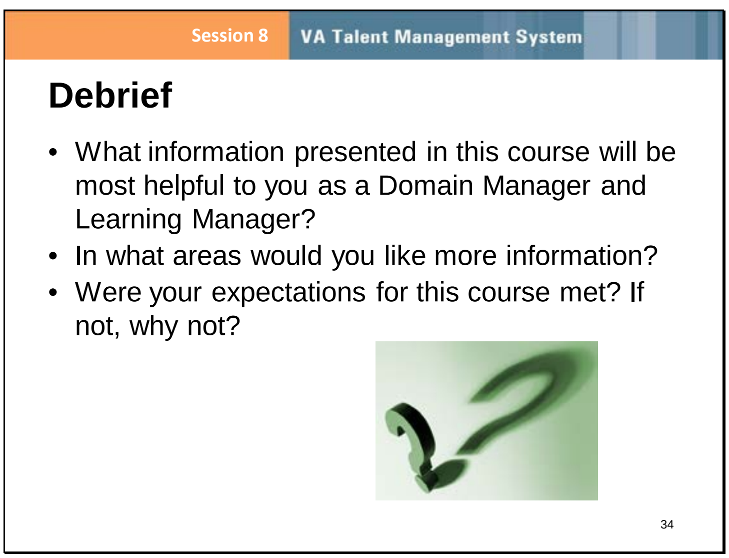
Notes:

1.5 *Course Summary*



Notes:

Slide 33: Course Summary



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Slide 34: Debrief

Session 8 VA Talent Management System

Session 1 Review

You should now be able to:

- Describe the capabilities of the learning and content modules of the VA TMS
- Describe the Learning Needs Management Model
- Navigate and search within the VA TMS as an administrator
- Explain how user and admin records are created and organized within the VA TMS
- Consolidate user records

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Slide 35: Session 1 Review

Notes:

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Session 2 Review

You should now be able to:

- Explain the relationship between items, catalogs, and curricula
- Describe the different types of items and curricula
- Create substitute and prerequisite relationships

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Slide 36: Session 2 Review

Notes:

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Session 3 Review

You should now be able to:

- Demonstrate how to add and configure items
- Configure an item as a requirement in a curriculum
- Set up an initial-based event curriculum

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Slide 37: Session 3 Review

Notes:

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Session 4 Review

You should now be able to:

- Define online content terminology
- Add and edit content objects
- Create online and blended items
- Add a content object to an item

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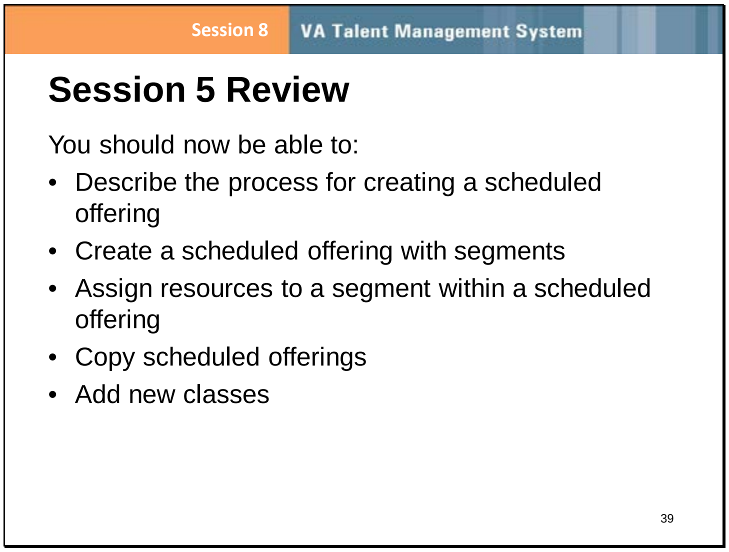
Slide 38: Session 4 Review

Notes:



Slide 39: Session 5 Review

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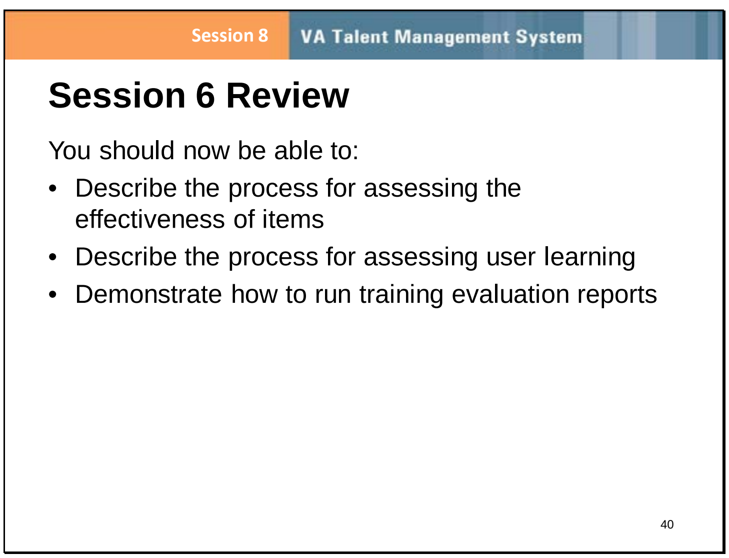

Slide 40: Session 6 Review

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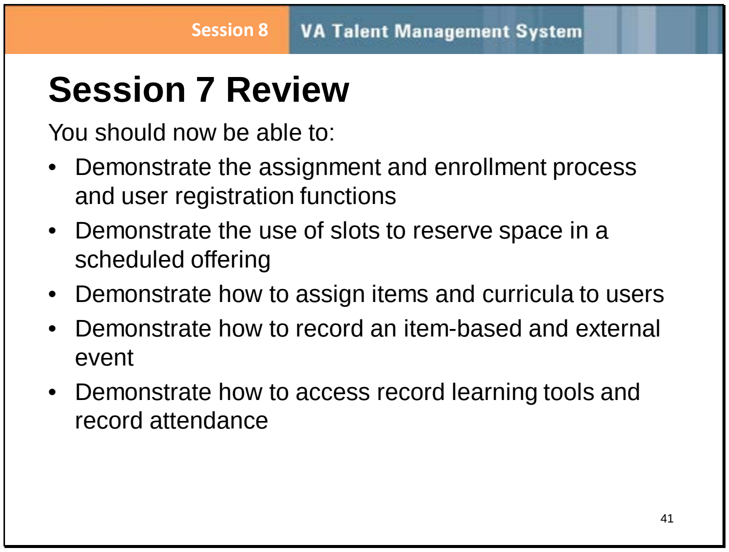

Slide 41: Session 7 Review

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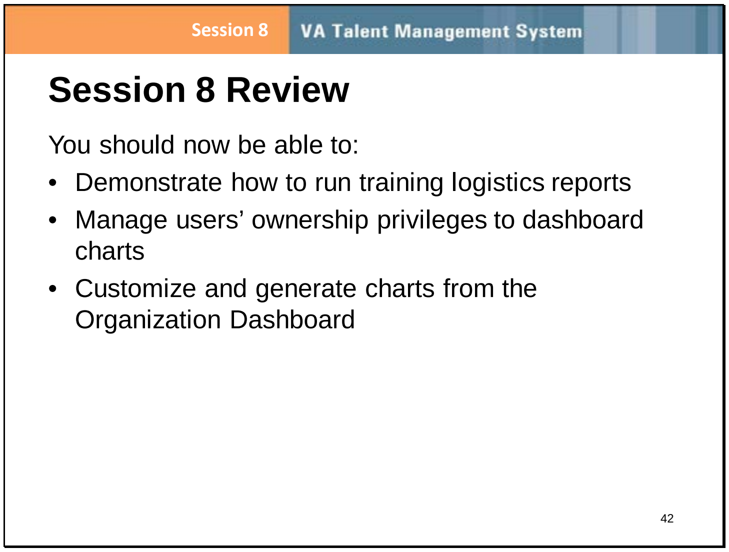

Slide 42: Session 8 Review

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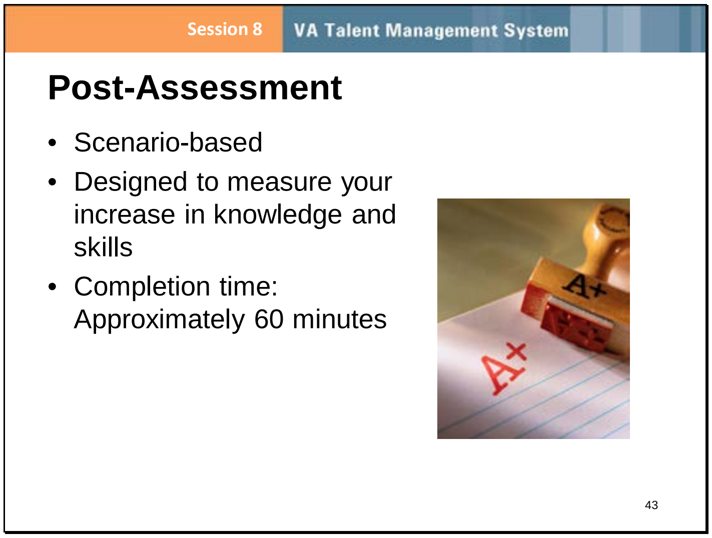
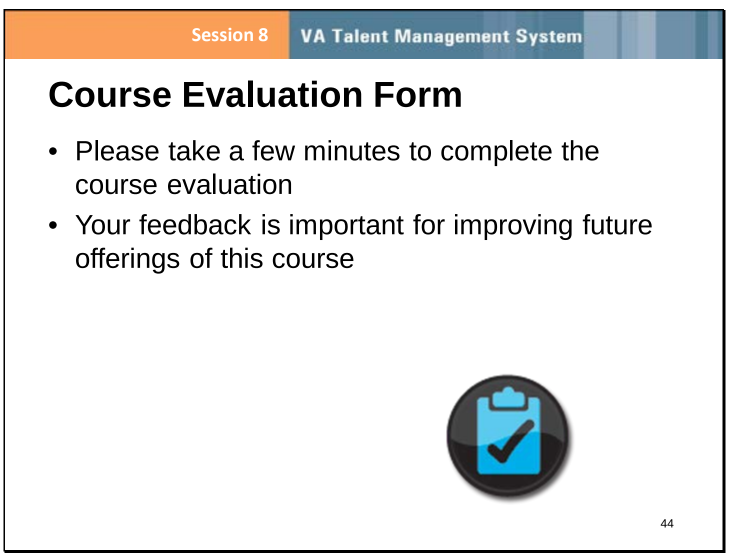


Slide 43: Post-Assessment

Notes:



Slide 44: Course Evaluation Form

Notes: